BOARD RECRUITMENT

When it comes time for nonprofits to invite new board members, it's easy to simply invite the closest warm body willing to serve, or your buddy who you know will say yes. Instead of falling into those traps, smart nonprofits approach recruitment in a deliberate manner. Here are recommendations and advice for effective board recruitment.

EARLY PREPARATION (one or more years ahead)

- **Recruitment is a continual year-round operation.** It's not just something to consider when an opening arises. Busy people often need time to make space in their life for a new commitment, or to consider whether or not it's a fit. So start raising the possibility of joining your board someday long before any formal invitation is issued.
- **Consider inviting potential board members to serve on a committee or in some other volunteer role before inviting them to serve on the actual board.** That enables both the person and the organization to get a feel for how each other operate and explore fit.

MEDIUM PREPARATION (2-12 months ahead)

- **Ensure there is a clear job description for what is expected from board members.** What's a realistic time commitment? Are they expected to contribute a certain amount of money, and/or do they actively fundraise? Do they serve on committees in addition to the board itself? How often are meetings held, and are they in-person or remote? How promptly are people expected to respond to communications? What are the other expectations and current needs?
- **Consider what areas are currently well filled on the board, and what areas are in need of further development.** For example, do you need one or more members who are skilled with tracking numbers, writing grant proposals, taking minutes, writing policy, risk management, community advocacy, lobbying, or other areas of expertise? Are there certain lived experiences that are important to board perspective? Are there forms of diversity that matter, such as geographic location or personal background? How about connections to the wider community? How are the dynamics on the current board, and what's missing? **Make a checklist of qualities/skills you are seeking.**
- **Create or update board service application or questionnaire.**
- **Make a list of interview questions to ask potential board nominees.**
- **Create/update board member letter of agreement** outlining expectations.
- **Update board handbook/packet and orientation materials.**

RECRUITMENT PROCESS

- Typically boards form a nomination or governance committee to oversee the recruitment process. While any board member may have an informal conversation with potential candidates, it's important to follow clear process for actual invitations to join the board. This usually happens *after* the committee charged with the task has reviewed a list of potential prospects, met with or spoken with several candidates, decided who should be asked, and also determined who the best person to make the ask will be.
- How to find good candidates?
  - Networks your nonprofit participates in
  - Past clients who received services
  - Review existing volunteers
  - Professional organizations
  - Job boards
  - University nonprofit programs

(*more on reverse)*

- Social media - make a post with link to a description of mission and board member responsibilities, along with application information.

- Avoid offering up a slate of candidates that is too large or too small. Nominating committees should start with a long list, then narrow it down after carefully considering each biography. Pick a small group of potential candidates to interview, then narrow the list down to 2-3 candidates for the full board to consider and vet further.
- *INTERVIEW:* It's essential to include a realistic sense of time commitment as part of this conversation; also ask potential nominees if they serve on other boards and whether they'd be overcommitted if they join yours. Query regarding potential conflicts of interest. Beware certain red flags, including candidates who:
  - are trying to pad a resume or enhance their position in the community without actually expecting to do much work, or who expect to be deferred to because of their celebrity status;
  - bring a personal agenda to the board, such as the artist bent on making the gallery focus on their preferred art form.

  Before concluding, ask potential candidates if they would be willing to serve if chosen. If a candidate expresses willingness to serve, let them know when you expect the formal process to take place and how they will be notified of the outcome.

ORIENTATION & ONBOARDING (mostly drawn from National Council of Nonprofits)

Include in the orientation background on any special issues that pertain specifically to your nonprofit's mission and activities, plus information on: governance policies, legal and fiduciary duties, accountability practices, and other key policies.

Invite fellow board members to lead relevant portions of the orientation, as a way for newcomers to get to know their colleagues on the board and the roles they play. Consider chunking orientation into a few smaller bites instead of one big gulp. The orientation may also include a field trip or training of some kind to see the nonprofit's mission in action.

Assign each incoming board member an experienced board member buddy. Check in with newcomers about 3 months in to see how it's going (either one-on-one or in the group).

Orientation List:

- Your nonprofit's mission and values
- Brief history of the nonprofit
- Bios of current board members and key staff
- Board member agreement
- Annual report, and possibly a list of key donors or grants received
- Recent financial reports and audited financials
- Bylaws and certificate of incorporation
- Determination letter from the IRS and certificate of tax exemption from the state
- Summary of Directors' and Officers' insurance coverage
- Conflict of interest policy and questionnaire
- Board travel reimbursement policy
- Whistleblower policy
- Access to past minutes
- Board roster and list of committees, their charters, and who serves on them
- Calendar of meetings for the year ahead